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ABSTRACT

Businesses have a great deal of expertise that could be useful to school districts. Business acumen can be used to make the educational system more efficient and effective or to make organizational and systems changes. An administrative school study can be undertaken by study teams of business personnel to determine problems in the district and suggest and undertake corrective action. Typical areas of study, recommendation, and correction might be in administrative organization, forms and recordkeeping, personnel practices and procedures, data processing, or food services. An administrative school study includes three parts: a feasibility study to identify problem areas; an indepth study, and implementation and reviews of operation. The first step is a presentation to the school board, and after each step the board must again determine if they want the business consultants to continue. In the design phase, staff suggestions must be considered. In New Jersey, school studies have been conducted and completed in Newark, Jersey City, Rahway, and the Union County Regional Districts and are underway in Trenton, Elizabeth, and Hamilton Township. (Author/JM)

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ADMINISTRATIVE SCHOOL STUDIES

A GUIDE TO IMPLEMENTATION

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ADMINISTRATIVE SCHOOL STUDIES

Introduction

For some time the business and education communities have been seen as separate entities operating pretty much in isolation from each other. Although this isolation has been broken occasionally by various work experience programs, talks at schools by business representatives, and occasional field trips to business and industrial locations, the fact remains that close working relationships between business and education have been infrequent and, therefore, have not substantially promoted better understanding between the two groups.

Business has always been familiar with the role of the public schools in preparing its future employees with the skills and attitudes necessary for success in the world of work. However, as the patterns of society have changed and the burdens placed on the schools have increased, business has frequently been less than satisfied with the quality of students reporting for work.

And as a major source for funding public education, business has sometimes publicly stated its concern about how effectively these tax dollars are used. For these reasons as well as others, suspicion and misunderstanding have acted to keep these sectors of society at arm's length.

Increasingly, and to the credit of both, there has been a growing awareness on the part of business and education that their interests in education are basically the same and that business can play a constructive, contributing role in the educational process that ultimately should have a positive effect on the individual student. Initial working relationships, particularly those under the auspices of Chambers of Commerce, have been notably effective in providing administrative assistance to school districts and in promoting strong bonds between business and school people.

The major purpose of administrative studies is to find areas of organization and procedure where the business acumen can be brought to bear on the educational system in order to make for a more efficient and effective operation.

Many business people feel that if a school district's administration operates more effectively and efficiently, not only is more value squeezed from the tax dollar, but harried administrators can attend more conscientiously to educational programs. Moreover, in addition to helping resolve administrative difficulties, projects like these have revealed to the business community the pervasive problems unique to running a school district. Further, it is reasoned that more efficient business practices will result in increased educational opportunities for the school district's youth.

METHOD OF STUDY

An administrative school study is performed by organized teams of business personnel with recognized expertise in particular administrative areas. These study teams employ a variety of techniques to determine the problems that exist in the district and possible courses for corrective action. Many representatives of each school department under study are personally interviewed by study team

members in order to determine job functions, reporting responsibilities, recommended operational improvements, and current problems.

Forms related to various aspects of pertinent employee and administrative responsibility are gathered and scrutinized. Necessary documents which affect and shape school board and administrative policy are reviewed. Also outside resources are utilized which have bearing on the system's business practices and administrative structure. Among these resources are the N.J. State Department of Education, other school districts, other municipal divisions, and special services such as legal counsel.

Many visitations to school buildings within the system are made as well as pertinent visits to other school districts.

Study teams meet as a group periodically to review progress and redirect efforts during the course of the study. Findings are discussed and attempts to secure additional manpower are made as the need arises. Also study team chairmen periodically meet to be sure that there is no overlap of study team responsibility.

The product of administrative studies is the study report which serves as a guide for short and long term steps to reorganize and strengthen the business activities of the school administration. The report is intended to analyze, not criticize. Functions and structures, not individuals, are analyzed and examined, for it is not the intent of the study to engage in personality assaults. A good number of the study recommendations can be implemented in the short run with little or no expense while some will require long-term planning and more considerable expenditure of funds. In the long haul, however, the monies saved by the implementation of study recommendations will result in a more efficient and effective educational system.

AREAS OF STUDY

Below are listed some of the areas in which business expertise can be of assistance to the educational system.

ADMINISTRATION

- Organization
- Forms and Record Keeping

PERSONNEL

- Practices and Procedures
- Employee Absenteeism

BUSINESS ACTIVITIES

- Data Processing
- Payroll
- Accounting
- Equipment Inventory Control

SUPPLY MANAGEMENT

- Purchasing
- Warehousing
- Receiving and Distribution
- Inventory Control

SCHOOL PLANT

- Design and Construction
- Custodial Services
- Maintenance and Repair

ADMINISTRATIVE SERVICES

- Reproduction Services
- Mail and Messenger Services

FOOD SERVICES

ADMINISTRATIVE SCHOOL STUDY PROCEDURAL GUIDE

Conducting an administrative school study is a three phase operation once the necessary approvals have been obtained from the school district and the sponsoring business organization.

Phase I: Feasibility Study

Time Period: 1 to 2 months

Manpower: 5 to 10 business experts
secretarial support

Phase II: In-depth Study

Time Period: 3 to 6 months

Manpower: 10 to 30 business experts
secretarial support

Phase III: Implementation and Operation Reviews

Time Period: ongoing

Manpower: as required

Some studies are initiated by a business organization, such as a chamber of commerce, interested in providing

assistance to a local school district. Others are initiated by school districts who have heard of the availability of business services and approach their local business group. Regardless of the impetus, the result must be to bring the two groups together to discuss problems that the school district is confronting and that the business community might help resolve. The result of this meeting is the identification of possible problem areas for study.

At this point the necessary approvals must be obtained before the feasibility study can be started. To obtain board of education concurrence, it may be necessary to make an oral presentation to the full board explaining study methods and procedures. At that point if the board is interested in business assistance, they must officially invite the business community in to do the study. Once this is accomplished, a presentation should be made to the policy making body of the business organization to obtain their official approval and support to commit manpower and begin the feasibility study.

Feasibility Study

The purpose of a feasibility study is to identify problem areas. Finding the causes and solutions to those problems is left to the in-depth study phase.

Based on the problem areas identified in the initial meeting with the school personnel, a small team of business experts should be assembled by the business organization sponsoring the project. One of these people or some other member of the business organization should be designated as the project director. The director has total responsibility for the completion of the project.

The feasibility team should meet alone first in order to assure that all team members are aware of the purpose of the study, the recommended study procedures, time commitments, and responsibilities.

The study team leader should then arrange a meeting, bringing together the study team and key representatives of the school district. The purpose of this meeting is to

focus in on problem areas originally defined as well as any new ones. The meeting also serves to introduce the business team to the educators with whom they will be working during the data gathering phase of the study.

As a result of the meeting between the feasibility team and the key educators, it may be necessary to add additional manpower to the feasibility team. This is particularly true if new problem areas are identified or if the experts in any of the areas of study feel that they will require additional manpower to do an adequate study.

By this point, areas of study have been defined and assigned, time frames have been determined, and responsibilities agreed upon. Team members are ready to begin the data collection process using recommended procedures.

At regularly scheduled intervals the team should meet as a unit to discuss mutual problems, areas of overlap, newly discovered areas for study, and manpower needs.

Many of the procedural steps outlined in the previous section pertaining to the feasibility study also pertain to the in-depth study. These include having the study teams meet first as units before meeting with any representatives of the Board of Education, holding meetings at regular intervals to discuss progress both for study teams and for study team Chairmen with the Director, circulating team final reports among the teams to assure no overlaps, omissions, etc., presenting the final report to the business organization first for their approval, and presenting the final report to the Board of Education for approval and implementation.

Conducting an in-depth study is a five phase operation:

Planning

Research

Research Review

Design

Recording

The major functions of the planning phase are to analyze the task and develop an appropriate work plan which

includes determining the required expertise, identifying individual tasks, designing appropriate documentation forms, projecting manpower requirements, and establishing completion dates.

In the research phase various methods of study are utilized which include interviewing, visitations, form review, systems analysis, validation of statistical data, and outside resources. Of vital importance is the establishment of good rapport with the educational personnel so that the required data can be obtained. Further, it is extremely important to document the source of all data.

All of the research data must be reviewed and organized in preparation for the design and recording phases of the study. Problems must be spelled out in detail with all available documentation. Based on the present work situation decisions are made as to what should be retained, what should be eliminated, and what should be revised.

In the design phase it is important to bring the business

expertise to bear in a positive mix with existing staff suggestions. All suggested changes should be discussed with existing staff to gain their support and lessen the shock of changing procedures. Further, all proposed systems changes should be accompanied by forms necessary to implement the recommended changes.

The recording phase involves the actual preparation of the final report. The Final Report should include:

Introduction
Description of areas studied
Organizational problems, general to specific
Work flow problems, general to specific
Solutions
    Description of present system
    Major problems in present system
    Solution
    Description of new system
    Benefits of new system over old system

At the conclusion of the data gathering stage each team member is responsible for preparing a written report outlining the discovered problem areas. It is the responsibility of the study leader to distribute these reports to other team members to assure that there is no overlap, no omissions, and no mistaken meanings. When all the drafts are returned with comments, the study leader is responsible for assembling the input into a cohesive report.

The final report is then presented to the executive board of the sponsoring business organization. The written report is accompanied by oral presentations by the team members. The business organization must accept the report before it can be presented to the board of education. Approval of the final report by the business organization means acceptance of the report and commitment of manpower to conduct the in-depth study.

Once the feasibility report is approved by the business organization, a similar presentation is made to the Board of Education. If the Board accepts the report, they must then determine if they want the business community to

continue their work and conduct the indepth study. If they choose to have the business community continue, they must officially request the business community to conduct the in-depth study.

In-Depth Study

The purpose of the in-depth study, as stated earlier, is to find causes of and solutions to the problems identified in the feasibility study.

In the in-depth study each problem area identified is studied by a team of business experts. Each team is headed by a Chairman who is responsible for the work of the team and for producing a team final report. A Project Director is responsible for the completion of the overall project, for coordinating the work of the various study teams, and for the production of one final report based on the input of the individual study team reports. It is not necessary that the business representatives who participated in the feasibility study participate in the in-depth study although some continuity would be beneficial.

IMPLEMENTATION AND OPERATION REVIEWS

Once the in-depth study report has been accepted by the Board of Education, implementation can be started immediately. One of the real values of business input to school administration is that the business community does not leave the school district to its own resources to implement the recommendations of the study. Rather the two groups work together to plug in the recommended organizational and systems changes.

Sometimes during implementation it is necessary to modify some of the in-depth study recommendations that do not prove operational in practice. Here again the business community remains on hand to help with the required modifications.

To insure that implementation is taking place, from time to time business teams are organized to review the progress made in specific areas of study. These operation review teams determine where the system presently stands in regard to implementing recommendations of the in-depth study.

Recommended study techniques are employed to determine present systems operation in relation to systems operation at the time of the in-depth study and in relation to recommended changes. Their findings are compiled in a written report and focus not only on the degree of implementation but also on the effect of implementation on the system's efficiency.

CONCLUSION

School studies have been conducted and completed to the benefit of the entire community in Newark, Jersey City, Rahway, and the Union County Regional Districts, and are underway at various stages in Trenton, Elizabeth, and Hamilton Township. In all of these efforts the local business community has worked closely with school personnel. Such relationships make good sense for business generally and particularly for New Jersey Bell, the largest statewide ~~private employer. New Jersey Bell employees have been~~ active in each of the above named studies, and in all cases our employees have found the experience personally rewarding.

In short, administrative assistance makes good community relations. We encourage you along with a business organization in your local community, to seriously consider approaching a school district in your area with the thought of offering business administrative expertise in the described manner.

Staff assistance is available from the Urban Affairs Department.